


## Quick Reference Tip Sheet

**NEW: 01/20/2015**

### General Information


Task	Process Information
Using the PO Close Request Page	The PO Close Request page was customized for GEARS Field Users to assist in the PO Close Request process. Use the PO Close Request page to select POs that have 'Dispatched' status and that are eligible to be closed. The process will automatically send a notification to Procurement. Procurement will then close the requested POs and any associated Requisitions.

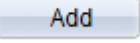
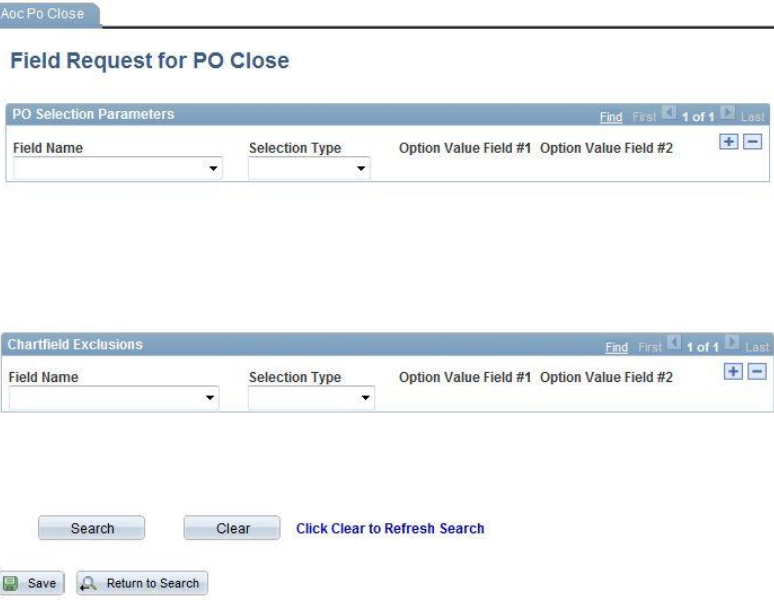
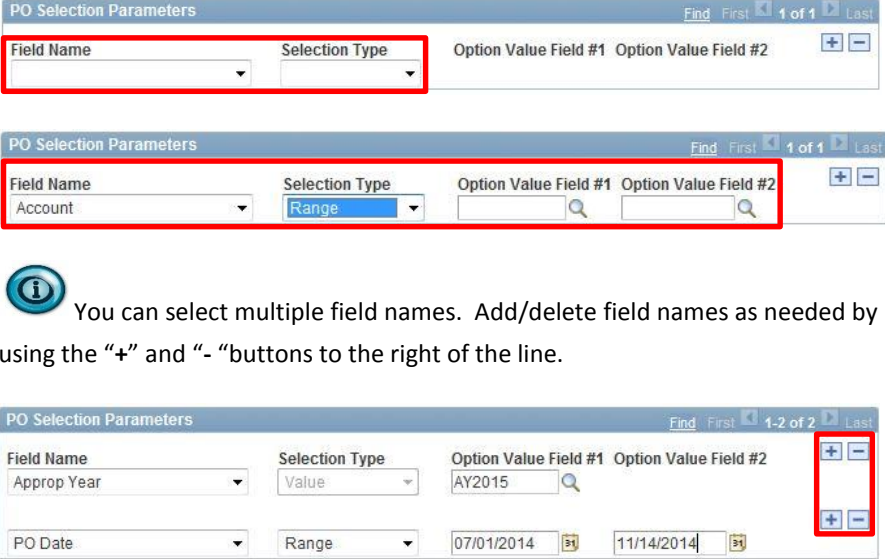

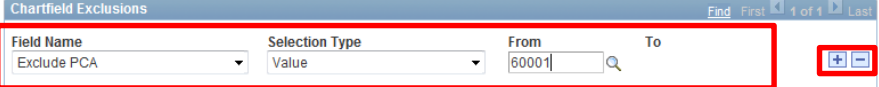

### GEARS Navigation

Purchasing > Purchase Orders > Review PO Information > PO Close Request	
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### 1.0 Process

This document is intended to provide a quick reference to using the PO Close Request Page within GEARS.

STEP	ACTION	DETAILS
1.	<p><b>Create the Run Control ID.</b> The first time you run the PO Close Request, you must create a new Run Control ID. Click on the <b>Add a New Value</b> tab.</p> <p><b>NOTE:</b> A Run Control ID is the name that will be given to the saved parameters you select for the report. You can run the same report again in the future by selecting the same Run Control ID when using the Find an Existing Value tab. No spaces are allowed in the Run Control ID. In addition, the report parameters for a Run Control ID can also be changed after selecting the ID.</p>	<p><b>PO Close Request</b></p>  <p>To use a Run Control ID that you previously created, click the <b>Find an Existing Value</b> tab, and then click the <b>Search</b> button. A list of Run Control IDs appears.</p>

2.	Click the  button.	
3.	The PO Close Request Page run control page displays.	
4a.	<p><b>Specify the PO Selection Parameters.</b> Select the Field Name criteria for your PO selection and select either a specific Value or a Range of Values for the field.</p> <p>You can select any single or combination of the following fields: Account, Appropriation Year, Account Encumbrance Indicator, Fund, PO Date, PO Number, Program Cost Account (PCA), Project, Vendor ID, or Vendor Name.</p> <p><b>NOTE:</b> The more selection criteria entered, the more granular your results will be.</p>	 <p> You can select multiple field names. Add/delete field names as needed by using the "+" and "-" buttons to the right of the line.</p>
4b.	<p>You can exclude any single or combination of the following <b>ChartFields</b>: Exclude Account, Exclude Fund, Exclude PCA, Exclude Program, Exclude Project, Exclude Zero Balance POs.</p>	 <p><b>NOTE:</b> You can select multiple field names. Add/delete field names as needed by using the "+" and "-" buttons to the right of the line.</p>
5.	Click the  button.	

**6. The results from the PO selection criteria display the following fields:**

PO Number, PO Date, Vendor ID, Vendor Status, Vendor Name, PO Amount, Vouchered Amount, PO Balance, and there is a link to view PO Lines.

**NOTE:** If there were no results from the PO selection criteria, the system will return the message, " \*\*\* No Records Found \*\*\* ".

	Close	Business Unit	PO Number	PO Date	Vendor ID	Vendor Status	Vendor Name	PO Amount	Vouchered Amount	PO Balance	PO Lines
1	<a href="#">Close</a>	MDJUD	0000046393	07/01/2014	0000011723	Approved	SANDY AUDIO VISUAL LLC	191,195.20	188,040.06	3,155.14	<a href="#">PO Lines</a>
2	<a href="#">Close</a>	MDJUD	0000046419	07/01/2014	0000006923	Approved	ADVANCED SOFTWARE SYSTEMS INC	168,000.00	67,500.00	100,500.00	<a href="#">PO Lines</a>
3	<a href="#">Close</a>	MDJUD	0000046420	07/01/2014	0000006923	Approved	ADVANCED SOFTWARE SYSTEMS INC	185,440.00	61,566.08	123,873.92	<a href="#">PO Lines</a>
4	<a href="#">Close</a>	MDJUD	0000046421	07/01/2014	0000000934	Approved	TALENT INFOTECH INC	173,480.00	59,499.00	113,981.00	<a href="#">PO Lines</a>
5	<a href="#">Close</a>	MDJUD	0000046422	07/01/2014	0000004660	Approved	NORMENT SECURITY GROUP INC	15,000.00	5,395.60	9,604.40	<a href="#">PO Lines</a>
6	<a href="#">Close</a>	MDJUD	0000046423	07/01/2014	0000005173	Approved	BWA COURIER	3,575.00	1,874.13	1,700.87	<a href="#">PO Lines</a>
7	<a href="#">Close</a>	MDJUD	0000046424	07/01/2014	0000007949	Approved	TECHNICAL SPECIALTIES INC DBA TSPEC	10,000.00	2,353.42	7,646.58	<a href="#">PO Lines</a>
8	<a href="#">Close</a>	MDJUD	0000046425	07/01/2014	0000005387	Approved	RUDOLPHS OFFICE & COMPUTER SUPPLY INC	135.85	135.85	0.00	<a href="#">PO Lines</a>
9	<a href="#">Close</a>	MDJUD	0000046426	07/01/2014	0000005387	Approved	RUDOLPHS OFFICE & COMPUTER SUPPLY INC	150.96	150.96	0.00	<a href="#">PO Lines</a>
10	<a href="#">Close</a>	MDJUD	0000046428	07/01/2014	0000000521	Approved	CA INC	201,100.00	201,100.00	0.00	<a href="#">PO Lines</a>



The page displays up to 10 POs at a time. If you have more than 10 POs as a result of your search, view additional POs as needed by using the left and right arrow buttons to the top right of the grid.

PO Amount	Vouchered Amount	PO Balance	PO Lines
191,195.20	188,040.06	3,155.14	<a href="#">PO Lines</a>
168,000.00	67,500.00	100,500.00	<a href="#">PO Lines</a>

**7. Select POs to be Closed.** Click the [Close](#) button next to the PO(s) that you request to be closed.

As you click Close, the Close button grays out which indicates the POs you are selecting to be closed.

**NOTE:** If all POs listed should be closed, you can click the [Select All](#) button to process all POs listed.

	Close	Business Unit	PO Number	PO Date	Vendor ID
1	<a href="#">Close</a>	MDJUD	0000044271	04/03/2014	0000005538
2	<a href="#">Close</a>	MDJUD	0000045296	05/15/2014	0000005755
3	<a href="#">Close</a>	MDJUD	0000045902	06/10/2014	0000005387
4	<a href="#">Close</a>	MDJUD	0000046194	06/22/2014	0000005538
5	<a href="#">Close</a>	MDJUD	0000046340	06/30/2014	0000009852

**8. Process PO Close Requests.** Click the [Process PO Close Requests](#) button.**9. The PO Close Request Confirmation page displays the list of POs you selected to be closed.**


**NOTE:** Review this list for accuracy. If you would like to make changes to the list, click the [Cancel](#) button to reset all selections or click the [Return](#) button to add to your existing selections.

Please confirm you wish to close the following PO's

Business Unit	PO Number	PO Date	Vendor ID	Vendor Status	Vendor Name	PO Amount	Vouchered Amount	PO Balance
1MDJUD	0000046393	07/01/2014	0000011723	Approved	SANDY AUDIO VISUAL LLC	191,195.20	188,040.06	3,155.14
2MDJUD	0000046421	07/01/2014	0000000934	Approved	TALENT INFOTECH INC	173,480.00	59,499.00	113,981.00
3MDJUD	0000046423	07/01/2014	0000005173	Approved	BWA COURIER	3,575.00	1,874.13	1,700.87

[CONFIRM](#)
[Return](#)
[Cancel](#)

**10. Click the [CONFIRM](#) button to submit the notification to Procurement to close the requested POs.**

11.	A system message displays confirming that the PO Close Request was successfully submitted.	
12.	Click the  button.	

**Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.